PENTARIA DEPLOYMENT GUIDES · GUIDE 3

Agent Lifecycle

Audience: IT Admin, Everyone · Last verified October 21, 2026

IT Admin · **Everyone** (Sections 2.4, 4 and 5.3 are for individual users)

CONTENTS

1. Before you start
2. Install agents
3. Deploy to the right people
4. Check you're on the current version
5. Update an agent
6. Remove an agent
7. Staff changes
8. End of subscription
9. Platform documentation

This guide covers the full life of a Pentaria agent in your organization: installing it, giving it to the right people, checking it's current, updating it, rolling it back, removing it, handling staff changes, and what to do when a subscription ends.

---

1. Before you start

IT Admin

- Complete the platform setup in Guide 1, including the required settings (**Code execution and file creation** and **Skills** turned on).
- Make sure you have the right role. On Claude, only **Owners** and **Primary Owners** can manage **Organization settings → Plugins & skills**. On Enterprise, members with a custom role that includes the **Libraries** permission can too. The role labeled **Admin** in your members list does not include this page.
- Download the agents from the Pentaria portal (agentexplorer.pentaria.com). Guide 1, Section 1.2 describes the three download formats.

DOWNLOAD FORMAT	WHAT IT IS ON CLAUDE	HOW YOU INSTALL IT
Individual agent (.zip)	A skill	Section 2.1 (organization) or 2.4 (individual)
Workflow package (plugin .zip)	A plugin containing every agent in the workflow	Section 2.2
Full library (plugin .zip, for IT Admins)	A plugin containing every Pentaria agent	Section 2.2

Upload the ZIP file as it is. Don't unzip, rename or repackage it. Claude expects the folder structure Pentaria provides, and changing it is the most common cause of failed uploads.

Avoid duplicates. Install each agent once. If you install a workflow package or the full library, don't also install the same agents individually. Two copies with the same name make it unclear which version people are using.

---

2. Install agents

2.1 Install an individual agent for your organization

`IT Admin`

1. Go to **Organization settings → Plugins & skills**.
2. Select **Add**, then **Upload a skill**.
3. Upload the agent's ZIP file from the Pentaria portal.
4. Find the agent on the **Inventory** tab, open the menu at the end of its row, select **Default access**, and choose who gets it (Section 3).

2.2 Install a workflow package or the full library for your organization

`IT Admin`

1. Go to **Organization settings → Plugins & skills**.
2. Select **Add**, then **Upload a plugin**.
3. Upload the plugin ZIP file from the Pentaria portal.
4. On the **Inventory** tab, open the plugin's row menu, select **Default access**, and choose who gets it (Section 3).

A plugin is managed as one item: you set its availability once, and it has one version history and one rollback point for every agent inside it.

2.3 Availability settings

SETTING	WHAT USERS EXPERIENCE	TYPICAL PENTARIA USE
Not available	Hidden; can't be installed	Withdraw an agent quickly, or keep it from people who shouldn't have it
Available to install	Users can choose to install it	Optional agents for specific roles

SETTING	WHAT USERS EXPERIENCE	TYPICAL PENTARIA USE
Installed by default	Already installed; users can turn it off	Agents and workflows most users need
Required	Installed and always on; users can't remove it	Your Pentaria Knowledge bundle (Guide 4); core agents you want used consistently

2.4 Install an agent for yourself (individual users)

`Everyone`

Use this if you're on an individual plan (Pro or Max), or if your administrator has asked you to install an agent yourself.

1. Download the agent's ZIP file from its page on the Pentaria portal.
2. In Claude, go to **Customize → Skills**.
3. Select **+**, then **+ Create skill**, then **Upload a skill**.
4. Upload the ZIP file and turn the skill on.

To install a workflow package for yourself, go to **Customize → Plugins**, select **Add**, then **Upload plugin**.

> If your organization already provides an agent centrally, don't install your own copy as well.

---

3. Deploy to the right people

`IT Admin`

Best practice: deploy company-wide only what you want everyone to have. Set an agent or workflow to *Installed by default* or *Required* for the whole organization only if every user should have it. Deploy individual agents and workflows that only some people need to just those users.

3.1 On Enterprise: use user groups

User groups come from your identity provider through SCIM, or you can create them under **Organization settings → Groups**.

1. Leave the agent's organization-wide **Default access** at *Not available* (or *Available to install*, if anyone may opt in).
2. Open the agent's row menu on the **Inventory** tab and select **Group access...**.
3. Choose the group and its availability, for example *Installed by default* for your product marketing group.

How Claude resolves settings: a group's setting replaces the organization-wide setting for that group's members, even when the group setting is stricter. When someone belongs to several groups with different

settings, the most permissive one applies.

3.2 On Team: share with named people

Team plans have no group setting, so everything you set organization-wide reaches every user. To give an agent or workflow to only some users:

1. Make sure **User-created skills** and **Skill sharing** are turned on (**Organization settings → Plugins & skills → Policy**).
2. Upload the agent or workflow to your own account (Section 2.4), not to the organization.
3. Share it with the specific people who need it.

Alternatively, those users can download the individual agents or workflow packages from the Pentaria portal and install them themselves (Section 2.4).

Need help planning a restricted deployment? Contact support@pentaria.com.

---

4. Check you're on the current version

`Everyone`

Every Pentaria agent states its version number when it introduces itself and includes a link to the Pentaria portal with that version built in. Click the link, signed in to your portal account, and the portal tells you whether an update is available. (See Guide 0, Section 8, including what the portal records when you use the link.)

- **Agent provided by your organization:** tell your IT Admin an update is available.
- **Agent you installed yourself:** update it as described in Section 5.3.

4.1 Release notifications

`IT Admin` `Content Owner`

Pentaria emails notifications of agent and workflow updates to your organization's **administrators** and **Content Owners** by default. Administrators can also opt other users in to these notifications in the Pentaria portal; for everyone else, notifications are off by default.

WHO	RELEASE NOTIFICATIONS
Administrators	On by default
Content Owners	On by default
Other users	Off by default; an administrator can opt them in

Details of each release, including what changed, are published in the release notes at pentaria.com/releasenotes.

When you receive a release email:

1. Read the release notes to see what changed and which agents or workflows are affected.
2. Download the new release from the Pentaria portal.
3. Install it as a new version of the existing item (Section 5.1). Consider trying it with your pilot group first.

---

5. Update an agent

5.1 Update an agent or workflow for your organization

`IT Admin`

Upload the new release as a new version of the existing item. Don't add it as a new skill or plugin. This keeps one item with its full version history and one-click rollback, and users get the new version automatically. Adding it as a new item creates duplicates.

1. Download the new release from the Pentaria portal.
2. Go to **Organization settings → Plugins & skills → Inventory** and open the agent or plugin's page.
3. Open the item's menu and select **Upload new version**.
4. Upload the new ZIP file.

To see what changed, open **Version history** on the item's page, open a version's menu and select **Compare with current**.

5.2 Roll back to an earlier version

`IT Admin`

If a new release causes a problem:

1. Open the item's page on the **Inventory** tab and go to **Version history**. The version users have now is marked **Current**.
2. Open the menu of the version you want and select **Revert to this version**, then confirm.

Users get that version, and **Current** moves to it. Reverting deletes nothing, so you can go forward again later with **Make this the current version**. Please also tell support@pentaria.com what went wrong.

5.3 Update an agent you installed yourself

`Everyone`

Download the new release from the Pentaria portal and upload it in **Customize → Skills** (or **Customize →**

Plugins for a workflow package), replacing your previous copy so you have only one.

> **Modified agents don't update.** If anyone in your organization has edited a Pentaria agent, installing a new release replaces the edited files and removes those changes. See Guide 7.

---

6. Remove an agent

`IT Admin`

To withdraw an agent temporarily (for example, while investigating a problem): set its **Default access** to *Not available*. Users stop seeing it and Claude stops loading it, including for people who had it installed. On Enterprise, also set any group that has its own **Group access…** setting for that agent to *Not available*.

To remove an agent permanently: open the item's menu on the **Inventory** tab and use the delete option.

Individual users remove an agent by deleting it in **Customize → Skills** (or **Customize → Plugins**).

---

7. Staff changes

`IT Admin`

Your organization manages its own Pentaria seats. Your administrator adds and removes users in the **User administration panel** of the Pentaria portal (agentexplorer.pentaria.com). Contact support@pentaria.com only if you need help.

7.1 When someone joins

	STEP
	Add them as a user in the User administration panel of the Pentaria portal, within your purchased seat count. If they should receive release notifications, opt them in.
	Make sure they have access to your AI system, and to any user groups that receive Pentaria agents.
	Point them to Guide 0 and their role's guides.

7.2 When someone leaves or no longer needs Pentaria

When a person leaves your organization, their access to Pentaria ends, and they must delete any copies of Pentaria agents they hold (Authorized User Agreement §7.1, §7.3).

	STEP	WHY
	Remove them in the User administration panel of the Pentaria portal.	Ends their access and frees the seat for someone else.

	STEP	WHY
	Remove their personal copies of Pentaria agents. On the Inventory tab, filter Source to members to see agents people added themselves.	Copies of Pentaria agents can't stay with someone who is no longer an Authorized User.
	Stop items they shared. Items a former member shared keep working for the people they shared them with. When the Inventory tab shows a notice about former members, select Review, then Stop sharing (or Delete).	Prevents agents from circulating without an owner.
	Reassign their Content Owner responsibilities. Give each deliverable they owned a new owner, update the owner in the deliverable's status block and in the Canonical Index, and update Pentaria Knowledge Builder access (Guide 4).	Official deliverables must never be left without an owner.
	Keep their Outputs. Deliverables they created belong to your organization; make sure the official copies are in your system of record.	Outputs belong to your organization, not the individual.

8. End of subscription

IT Admin

When your organization's subscription ends, Pentaria deactivates your users' portal accounts, and version checks stop working. Under your agreement, your organization must then delete all copies of the Materials, including Modified Materials, from its systems. Your Outputs and Customer-Developed Tools are not affected and remain yours. *(Master Services Agreement §7.4, or Terms of Service §14.4; Authorized User Agreement §7.3.)*

8.1 What to keep and what to delete

ITEM	KEEP OR DELETE	WHY
Deliverables your agents produced (Market and Product Definitions, ICPs, battle cards, etc.)	Keep	Outputs belong to your organization permanently.
Your completed Company Context File and Canonical Index	Keep	Completed templates are Outputs.
Your Pentaria Knowledge bundle	Keep	It contains your Outputs.
Agents and tools your team built without copying or adapting Pentaria Materials	Keep	Customer-Developed Tools belong to your organization.
Pentaria agents, workflow packages and the full library	Delete	Materials are licensed only for the subscription term.
The Pentaria Knowledge Builder	Delete	It's a Pentaria agent.
Pentaria's blank templates	Delete	Blank templates are Materials.
Any Pentaria agent or template your organization edited or adapted	Delete	Modified Materials are part of the Materials.
Any content produced by asking an agent to display or restate its own instructions	Delete	It remains Materials, not an Output.

8.2 Checklist

	STEP
	Inventory. In Organization settings → Plugins & skills → Inventory, list every Pentaria agent and plugin, including the Pentaria Knowledge Builder.
	Withdraw. Set each one to Not available (and any Enterprise group settings too), so nobody can keep using them.
	Delete each Pentaria agent and plugin from the inventory.
	Check personal copies. Filter Source to members and identify any Pentaria agents, or edited versions of them, that individuals added. Ask those users to delete them.
	Individual plans. Ask anyone who installed Pentaria agents on a Pro or Max account for work to delete them from Customize → Skills and Customize → Plugins.
	Other copies. Delete downloaded Pentaria ZIP files and blank templates from shared drives, repositories and laptops.
	Keep your Outputs. Confirm your deliverables, Company Context File, Canonical Index and Pentaria Knowledge bundle are safely stored in your system of record (Section 8.1).

9. Platform documentation

- Claude: Manage plugins for your organization
- Claude: Provision and manage skills for your organization
- Claude: Using skills